



## EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Amended Form.  
Originally Submitted  
on 08-19-16.  
BLT

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Jason Thielman

Employing Office/Committee: Office of Senator Steve Daines

Private Sponsor(s) (list all): Council on Foreign Relations

Travel date(s): Monday, September 19, 2016

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Destination(s): New York, NY

Explain how this trip is specifically connected to the traveler's official or representational duties:

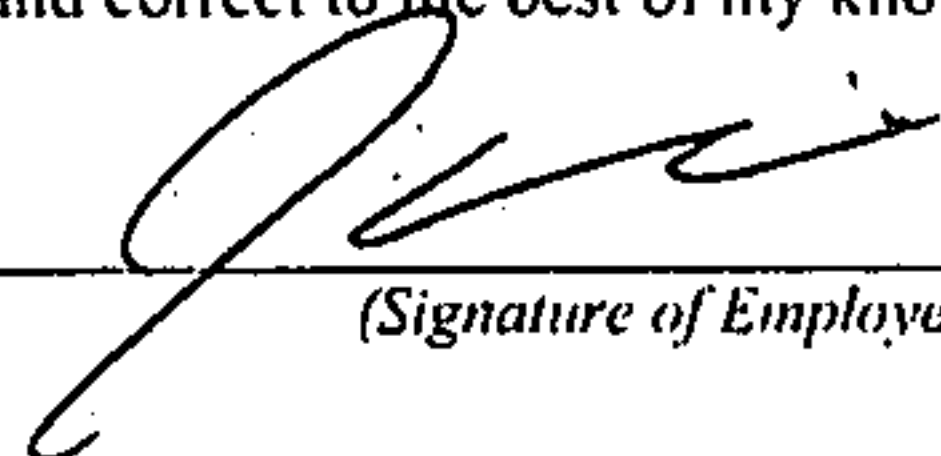
As Senator Daines' Chief of Staff, this trip will aid me in appropriately advising the Senator on foreign relations and affairs. In New York I will attend a panel discussion and meet with foreign policy and national security experts located at CFR's headquarters.

Name of accompanying family member (if any): N/A

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8/19/16  
(Date)

  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Steve Daines hereby authorize Jason Thielman  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

8/19/16  
(Date)

  
(Signature of Supervising Senator/Officer)

1777 F Street, NW, Washington, DC 20006  
tel 202.509.8400 fax 202.509.8400 [www.ecfr.org](http://www.ecfr.org)

**Mr. Jason Thielman**  
**Chief of Staff**  
**Office of Senator Steve Daines**  
**320 Hart Senate Office Building**  
**Washington, DC 20510**

I write to invite you to participate in a day-long visit to the Council on Foreign Relations (CFR) New York headquarters on Monday, September 19, as part of your ongoing participation in the CFR congressional foreign policy study group. This trip will provide you, and the other study group members, an opportunity to engage with members of the council, CFR fellows based in New York and *Foreign Affairs* senior editorial staff.

**We hope that you will take advantage of this unique opportunity. If you have any questions, please feel free to contact me directly at 202.509.8458 or by email at [pcostello@cfr.org](mailto:pcostello@cfr.org).**

Sincerely,

**Patrick C. Costello**  
**Director, Washington External Affairs**  
**Council on Foreign Relations**

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## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Council on Foreign Relations (CFR)
2. Description of the trip: Provide congressional staff members participating in CFR's foreign policy study group an opportunity to visit CFR's New York office and participate in a day of substantive programming.
3. Dates of travel: Monday, September 19
4. Place of travel: New York, NY
5. Name and title of Senate invitees: See attached documentation
6. I certify that the trip fits one of the following categories:
  - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
  - OR -
  - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
  - AND -
  - ☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:
  - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
  - AND -
  - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).



**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**  
 Quantify that if:

I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**  
If the trip includes a stay at a hotel, please provide the following information:

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An Itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

CFR is the only sponsor of this trip and is covering all associated costs.

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\_\_\_\_\_

\_\_\_\_\_

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

CFR is an independent think tank and membership organization dedicated to being a resource for its members, government officials, and other interested citizens in order to help them better understand the world and the foreign policy choices facing the United States.

Briefly describe each sponsor's prior history of sponsoring congressional trips:  
CFR hosted a similar trip to New York on September 25, 2015.

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CFR hosted a similar trip to New York on September 25, 2015.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

CFR hosts several different meeting series on Capitol Hill for members of Congress and senior congressional staff for the purposes of informing the policy making community of the foreign policy and national security issues confronting the United States.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	Rail travel costs: \$400  Round-trip ground transport from rail station to CFR offices: \$50	N/A	Approx.: \$50	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is taking place with regard to congressional participation.

18. Reason for selecting the location of the event or trip

The Council on Foreign Relations is headquartered in New York City.

19. Name and location of hotel or other lodging facility:

N/A

20. Reason(s) for selecting hotel or other lodging facility:

N/A

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meal costs are estimated to be far less than the \$74 per diem rate for this location.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will travel from Washington, DC to New York on Amtrak Acela services (business class).

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.)

Signature of Travel Sponsor: 

Name and Title: Patrick C. Costello; Director, Washington External Affairs

Name of Organization: Council on Foreign Relations

Address: 1777 F Street, NW Washington, DC 20006

Telephone Number: 202-509-8458

Fax Number: 202-509-8400

E-mail Address: pcostello@cfr.org

List of Senate invitees to Council on Foreign Relations trip to New York, NY

The aforementioned employees of the United States Senate have been selected to participate in a Council on Foreign Relations (CFR) congressional study group. This is a CFR initiative where we have identified a cohort of senior-level congressional staff to participate in off-the-record dinner discussions with members of the Council on Foreign Relations, CFR fellows, and other notable individuals and is part of our ongoing efforts to help build an informed, bipartisan community of senior congressional staff from both chambers. This trip to the CFR offices in New York is part of the study group activities and participants will attend a lunch meeting, with other members of the CFR, and meet with CFR experts based in New York.

1. Michael Buchwald, Minority Counsel/Deputy Staff Director, Senate Select Committee on Intelligence
2. Jonathan Cardinal, Director of Economic Development, Office of Senator Kirsten Gillibrand
3. Katherina Dimenstein, Legislative Assistant, Office of Senator Joni Ernst
4. Sierra Forbes-Robinson, Legislative Assistant, Office of Senator Michael Crapo
5. Brett Freedman, Minority Counsel, Senate Select Committee on Intelligence
6. Emily Harding, Professional Staff Member, Senate Select Committee on Intelligence
7. Church Hutton IV, Professional Staff Member, Senate Appropriations Subcommittee on Defense
8. Jongsun A. Kim, Professional Staff Member, Senate Select Committee on Intelligence
9. Julie Klein, Deputy National Security Advisor, Office of the Senate Minority Leader
10. Tara McFeely, Professional Staff Member, Senate Select Committee on Intelligence
11. Brian Andrew Miller, Professional Staff Member, Senate Select Committee on Intelligence
12. Ryan Pettit, Senior Advisor for National Security, Office of Senator Patty Murray
13. Jason Thielman, Chief of Staff, Office of Senator Steve Daines
14. Morgan L. Vina, Policy Analyst, Senate Foreign Relations Committee
15. Ryan White, Professional Staff Member, Senate Select Committee on Intelligence

House of Representatives staff also invited to participate are listed below:

1. Jeffrey Ashford, Staff Assistant, House Appropriations Subcommittee on Commerce, Justice, Science, and Related Agencies
2. Peter Billerbeck, Defense and Foreign Policy Advisor, Office of Representative Seth Moulton
3. Elizabeth Conrad, Professional Staff Member, House Armed Services Committee
4. Kenneth Cummings, Budget Analyst, House Budget Committee
5. Kristen Marquardt, Professional Staff Member, House Foreign Affairs Committee
6. Jamie Morgan, Legislative Director, Office of Representative Tulsi Gabbard
7. Daniel Silverberg, National Security Advisor, Office of the House Minority Whip
8. Andy Taylor, Deputy Chief of Staff/Legislative Director, Office of Representative Sean Duffy
9. Reagan Thompson, Communications and Policy Advisor, Office of Representative Mike Pompeo
10. Michael Turner, Senior Policy Advisor, Office of Representative Adam Smith



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